

# Employee Post-Travel Disclosure of Travel Expenses

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**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The original *Employee Pre-Travel Authorization* (Form RE-1), AND
- ☐ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Pew Charitable Trusts

Travel date(s): September 15, 2017 - September 17, 2017

Name of accompanying family member (if any): N/A

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate.	\$116.27	\$286.00	\$128.00	N/A
<input checked="" type="checkbox"/> Actual Amount.				

## Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate.	N/A	N/A	N/A	N/A
<input type="checkbox"/> Actual Amount.				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached agenda.

9/25/17  
(Date)

Kalina Bakala  
(Printed name of traveler)

[Signature]  
(Signature of traveler)

## TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

9/25/17  
(Date)

Tammy Duckworth  
(Signature of Supervising Senator/Officer)

(Revised 1/3/11)

Form RE-2

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Name of Traveler: Kalina Bakatov

Private Sponsor(s) (list all): The Pew Charitable Trusts

*Note: If you plan to extend the trip for any reason you must notify the Committee.*

Explain how this trip is specifically connected to the traveler's official or representational duties:

Name of accompanying family member (if any): N/A

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

VB  
(Signature of Employee)

I, Tammy Duckworth hereby authorize Kalina Bakalov  
(Print Senator's/Officer's Name) (Print Traveler's Name)

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐ *no*

*Tammy A. Smith*  
(Signature of Supervising Senator/Officer)



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The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

- Private Sponsor Certification - Page 1 of 4

9.

**USE ONLY IF YOU CHECKED QUESTION 5(B)**  
 I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

- OR -

- ☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10.

**USE ONLY IF YOU CHECKED QUESTION 3(B)**  
If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:


11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

**The Pew Charitable Trusts is the sole organizer and sponsor of this trip.**


13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

**See attachment.**


14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

**See attachment.**


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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

See attachment.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$73.57/roundtrip	\$286	\$128	
<input type="checkbox"/> Actual Amounts	\$44.51/local transportation			

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Richmond was selected due to its close proximity to Washington, DC and its historical significance.

19. Name and location of hotel or other lodging facility:

The Jefferson Hotel, 101 W. Franklin Street, Richmond, VA 23220

20. Reason(s) for selecting hotel or other lodging facility:

The Jefferson Hotel can provide the necessary meeting space for the planned seminars and can provide the required number of guest rooms to accommodate the group.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are at the per diem rate for Richmond, VA.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Transportation to Richmond will be provided via Amtrak using the lowest coach fare. Transportation back	
to Washington, DC, will be via coach bus.	

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: David W. Gilliland

Name and Title: David Gilliland, Officer

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, 10th Floor, Washington, DC, 20004

Telephone Number: (202) 552-2145

Fax Number: (202) 552-2299

E-mail Address: dgilliland@pewtrusts.org



Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts  
Management and Leadership Retreat, September 15-17, 2017

1-10. See form

11. See attachment.

12. See form.

13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the retreat is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.

14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the sixth Senate chiefs of staff retreat hosted by Pew (2007, 2009, 2011, 2014, 2015). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.

15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.

16. See form.

17. See form.

18. See form.

19. See form.

20. See form.

21. See form.

22. See form.

23. See form.

24. See form.

25. See form.



## Bipartisan Senate Chiefs of Staff Conference Richmond, Virginia | September 15-17, 2017



# Conference Schedule

### Friday, September 15, 2017

- 2:30pm Depart Union Station via Amtrak 95 (coach fare)
- 5:15pm Arrive Main Street Station, Richmond
- 5:30pm Travel via bus to Jefferson Hotel, 101 W. Franklin Street
- 5:40pm Arrive Jefferson Hotel, check in (GSA per diem rate)
- 7:30-9:30pm Dinner with keynote speaker **Historian Alexander Rose**, author of *Washington's Spies: The Story of America's First Spy Ring* (now the TV show "Turn: Washington's Spies"). Review agenda and goals of conference. (Empire Room)

### Saturday, September 16, 2017

- 8:30-9:30am Breakfast at your leisure, Jefferson Hotel (Rotunda)
- 9:30-11:30am **Breakthrough Communication: Navigating High-Stakes Conversations, Peter and Susan Glaser**  
Communication skills are the first step in developing strong relationships, making quality decisions, and creating high performance teams. But, most importantly, communication can serve as a tool to constructively manage conflict. This training is rooted in the Glasers' 39 years of field-tested and published research on interpersonal communication and leadership development. Participants learn communication models to understand and transform high-stakes conversations into a powerful and effective stimulus for change. (Grand Ballroom)
- 11:30am-12:00pm Break
- 12:00-1:15pm Lunch with speaker **Larry Sabato**, the University of Virginia (Ginter Gallery)
- 1:15-2:30pm **State of the News Media, Amy Mitchell, Pew Research Center**  
Eight years after the Great Recession sent the U.S. newspaper industry into a tailspin, the pressures facing America's newsrooms have intensified to nothing less than a reorganization of the industry itself, one that impacts the experiences of even those news consumers unaware of the tectonic shifts taking place. Amy Mitchell will brief chiefs on the annual "State of the News Media" report and its implications on public policy. (Grand Ballroom)

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2:30-2:45pm	Break
2:45-3:45pm	<b>How Technology, Robotics and Automation May Affect the U.S. Economy in the Future, David Pogue, Yahoo Technology</b> David Pogue is the tech critic for Yahoo Finance, and was previously the personal-technology columnist for the New York Times for 13 years. He's also a monthly columnist for Scientific American and host of science shows on PBS's "NOVA," and a correspondent for "CBS Sunday Morning" since 2002. (Grand Ballroom)
6:00pm	Buses depart for Governor's Mansion
6:15pm	Arrive Governor's Mansion, Capitol Square
6:30-8:00pm	Reception - <b>Remarks by Gov. Terry McAuliffe</b>
8:00pm	Buses Depart for Jefferson Hotel

### **Sunday, September 17, 2017**

8:00-9:00am	Breakfast at your leisure, Jefferson Hotel - Bag Call (Empire Room)
9:05-9:15am	Greeting from <b>Senator Tim Kaine</b> (Grand Ballroom)
9:15-10:15am	<b>It's the Economy - Bill McInturff, Public Opinion Strategies, and Geoff Garin, Hart Research</b> Pollsters McInturff and Garin will explore Americans' attitudes and views regarding jobs, the economy and the current state of the "American Dream" to better inform chiefs of staff as they tackle legislation in these areas. (Grand Ballroom)
10:15-12:00pm	<b>Presidential Recordings – The Executive/Legislative Branch Relationship Through History, Marc Selverstone, the Miller Center at UVA</b> To assist chiefs in gaining a better understanding of effective working relationships between the legislative and executive branches, this session will explore the interactions between the president and Senate leadership over the years through the Miller Center's exhaustive collection of Oval Office recordings from Kennedy through Nixon. (Grand Ballroom)
12:00pm	Pick up box lunches
12:15pm	Buses depart Jefferson Hotel for Washington
3:00pm (approx.)	Arrive Union Station parking garage

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**Bipartisan Senate Chiefs of Staff Conference**  
Richmond, Virginia | September 15-17, 2017



**List of Participants**

CHIEF OF STAFF	SENATOR	GUEST
Nathan Barankin	Sen. Kamala D. Harris	Ann Patterson
Allyson Bell	Sen. Mike S. Lee	
Sarah Benzing	Sen. Sherrod C. Brown	
Adam Bramwell	Sen. Christopher A. Coons	Laurie Syme
Katie Britt	Sen. Richard C. Shelby	Wesley Britt
Brennen Britton	Sen. Jerry Moran	
Joe Britton	Sen. Martin T. Heinrich	
John Connell	Sen. Todd C. Young	Marjorie Connell
Jackie Cottrell	Sen. Pat Roberts	
Michaelleen Crowell	Sen. Bernie Sanders	James Crowell
Jonathan Davidson	Sen. Michael F. Bennet	
J.P. Dowd	Sen. Patrick J. Leahy	Kara Dowd
Kaitlin Fahey	Sen. Tammy Duckworth	Kalina Bakalov
Dan Geldon	Sen. Elizabeth A. Warren	Heather Geldon
Kristen Gentile	Sen. Robert P. Casey Jr.	
Sam Goodstein	Sen. Sheldon Whitehouse	
Joseph Hack	Sen. Deb Fischer	
Brigit Helgen	Sen. Amy Klobuchar	
Mike Henry	Sen. Tim Kaine	
Allison Herwitt	Sen. Chris S. Murphy	
Natasha Hickman	Sen. Richard Burr	
Luke Holland	Sen. Jim Inhofe	
Mark Isakowitz	Sen. Rob J. Portman	
Beth Jafari	Sen. John Cornyn III	Sara Garland
Maura Keefe	Sen. Jeanne Shaheen	Tom O'Donnell

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Chris Carr

Victoria Edelman

## Jennifer Duck

Maggie Lynch

**Susan Michels**

**John Wertheim**

## Shannon Quinn

Tom Quinn

**Sen. Bill Cassidy**

**Sen. Bill Nelson**

Sen. Angus S. King Jr.

Sen. Chris Van Hollen

**Sen. Cory Gardner**

**Sen. Orrin G. Hatch**

**Sen. Mike B. Enzi**

**Sen. Steve Daines**

**Sen. John N. Boozman**

**Sen. Debbie A. Stabenow**

Sen. Charles E. Schumer

Sen. Mike D. Crapo

**Sen. Bob P. Corker**

Sen. Jeff A. Merkley



THE PEW CHARITABLE TRUSTS



## Bipartisan Senate Chiefs of Staff Retreat

### The Pew Charitable Trusts

Invites You and Your Spouse  
To the 6th Biennial

#### **Senate Chiefs of Staff Management and Leadership Retreat**

Richmond, Virginia  
September 15-17, 2017

The Pew Charitable Trusts will host a retreat for the Senate Chiefs of Staff from September 15-17, 2017, in Richmond, Virginia. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the draft agenda is attached.

We will depart Union Station on Friday, September 15, at 2:30 p.m., on a reserved Amtrak car and return via bus on Sunday, September 17, arriving back at the Capitol at approximately 2:15 p.m. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated at around \$250).

Please [click here](#) to register, and we look forward to seeing you in historic Richmond this fall!

Tamera Luzzatto  
Senior Vice President, Government Relations  
The Pew Charitable Trusts  
[tluzzatto@pewtrusts.org](mailto:tluzzatto@pewtrusts.org)  
(202) 540-6501

*The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.*

The Pew Charitable Trusts  
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